



# **Federal Student Aid (FSA) Students and Financial Partners Portals**

## **Stabilization and Transition Support Status Report**

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## **1. Executive Summary**

### **1.1 Introduction**

The FSA Students and Financial Partners (FP) Portals provide information and productivity tools relevant to FSA's customers, employees, and partners to make informed financial aid decisions and empower financial partners to assist students. The Portals also provide links to other existing FSA web sites (e.g., FMS, FAFSA on the Web, NSLDS, DLSS, etc.), and external sites (ELM Net, Meteor, etc.).

### **1.2 Background**

In April 2002, FSA launched Release 1.0 of both the Students and FP Portals. In September 2002, Release 1.1 of the Students Portal and Release 2 of the FP Portal were made available with additional information, tools, and links. Release 2 of the Students Portal has been delayed so that the necessary paperwork and postings can take place to meet the Privacy Act requirements for System of Record as well as the OMB requirements for the Information Collection Clearance process. Specifically, the Portals are organized as follows:

#### **Students Portal**

- Student experience/life-cycle
  - Preparing
  - Choosing
  - Applying
  - Funding
  - Attending
  - Repaying
- Site Resources
- Content organized around the Student type (e.g., College, High School, etc.)
- Spanish content
- Links to other FSA systems (e.g., FAFSA on the Web, NSLDS, etc.)
- Search
- Contact Resources

#### **FP Portal**

- Links to other FSA Financial systems (e.g., FMS, Data Mart, etc.)
- Publications
- Community members
- Current activities
- Interest rates
- Search
- Contact Resources



## 1.3 Report Organization

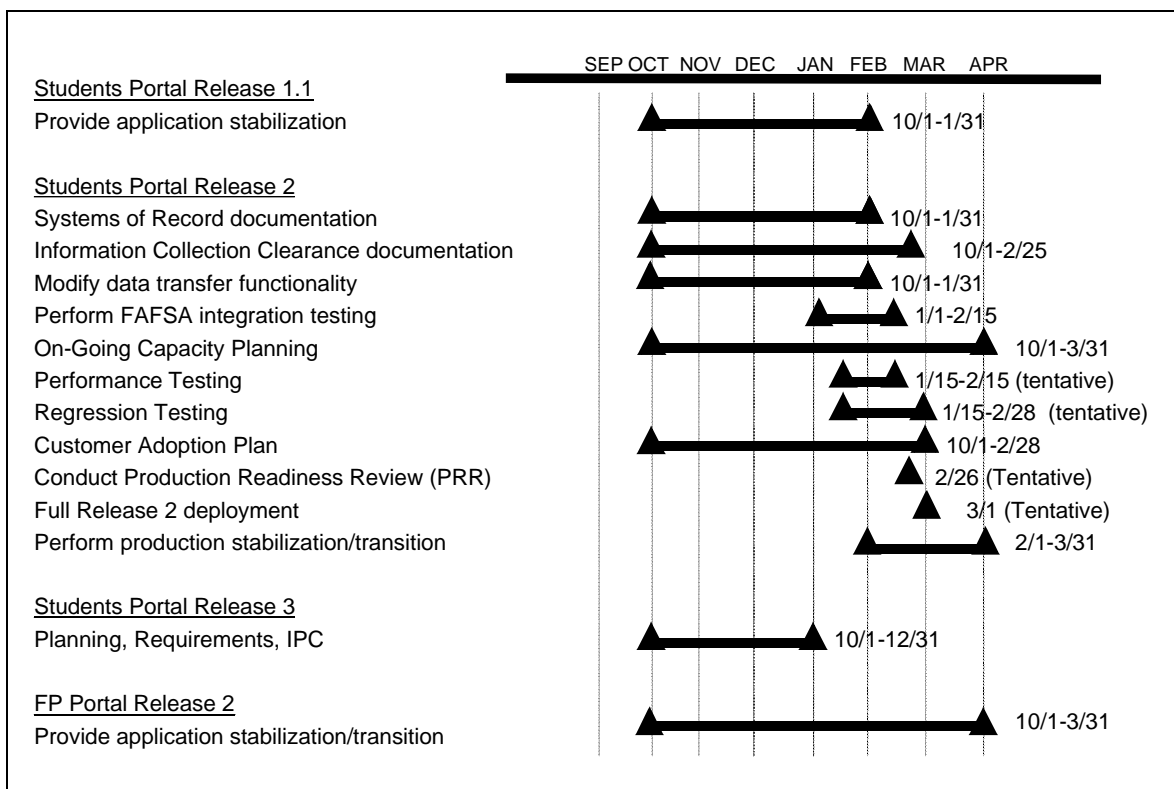
This Stabilization and Transition Support Status Report includes the following:

- Section 2. Students Portal Status. This section provides an update on completed and planned activities for the Students Portal.
- Section 3. Financial Partners Portal Status. This section provides an update on completed and planned activities for the Financial Partners Portal.
- Section 4. Summary. This section provides a summary of the project and production status.

## 2. Students Portal Status

### 2.1 Overall Project Schedule

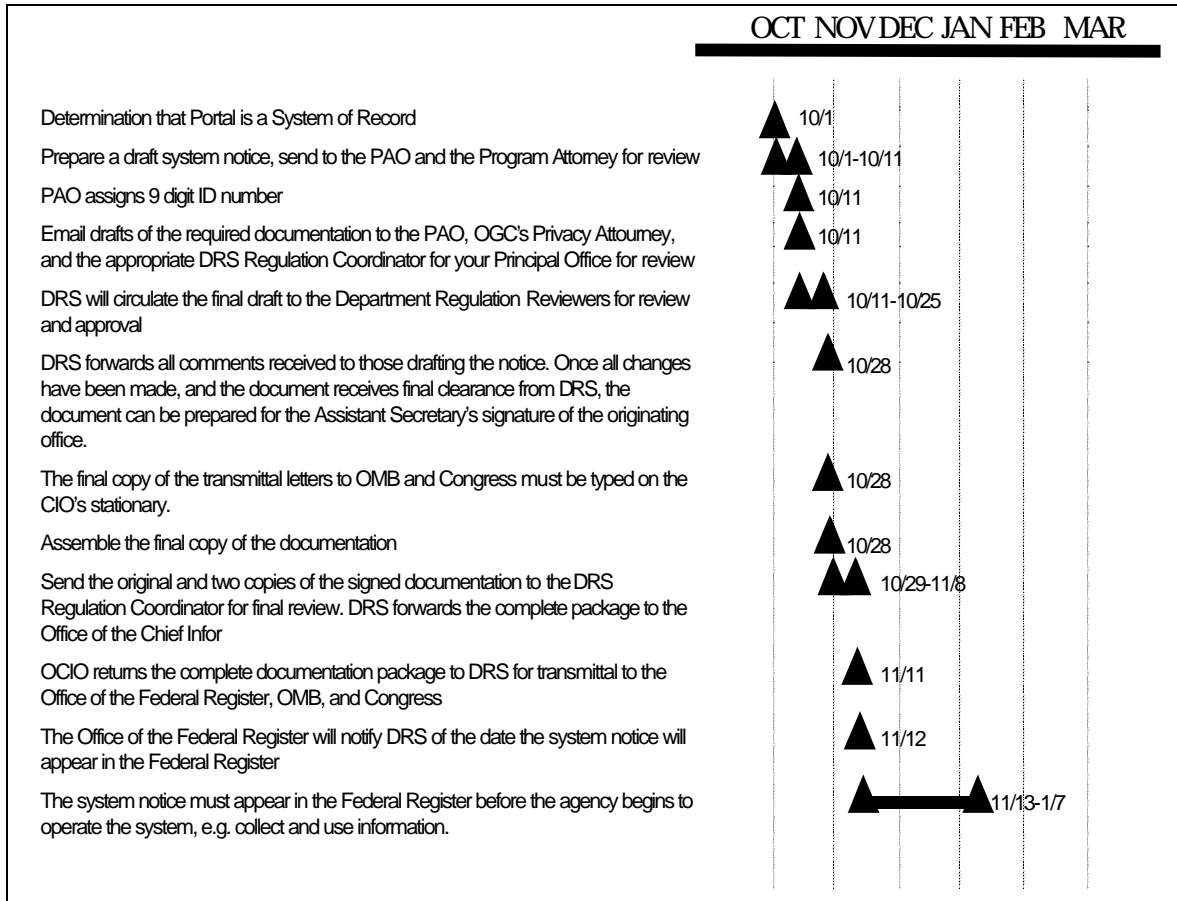
The overall project schedule for the Students Portal is shown below.





## 2.2 Privacy Act (System of Record) Schedule

The detailed schedule for the System of Record is shown below.

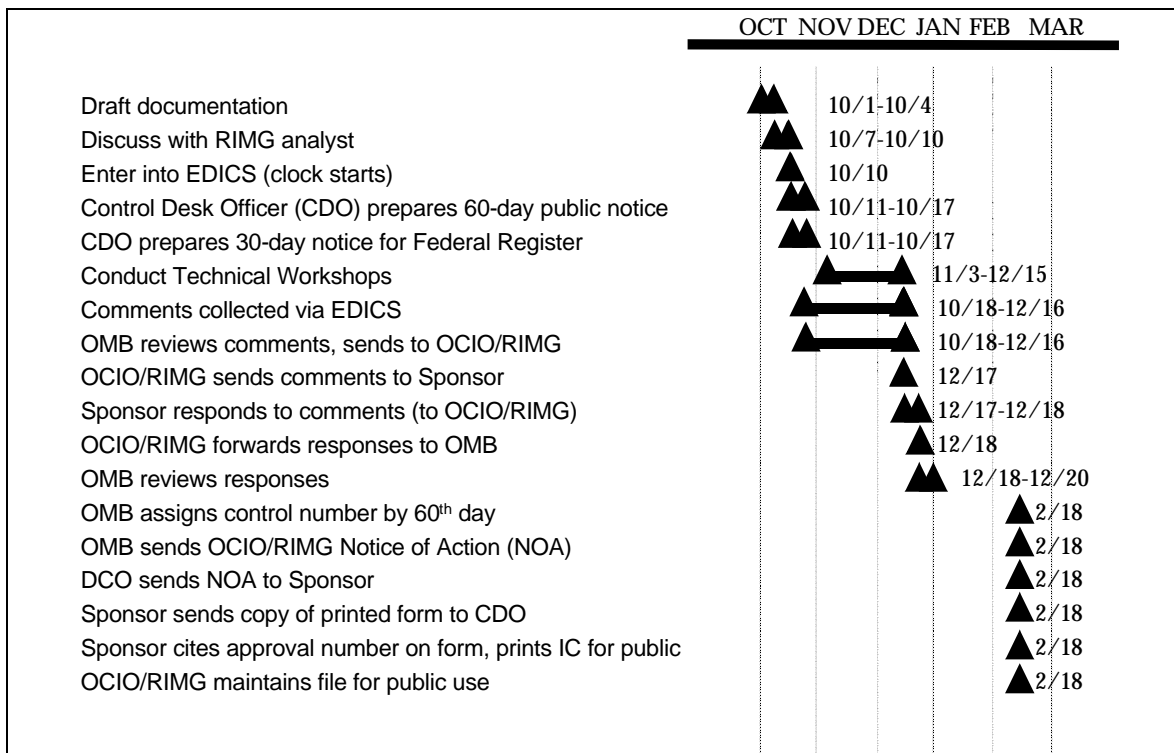


There have been several meetings with the Office of General Counsel (OGC). They have provided feedback, but continue to discuss the current design of the Portal. There is a risk that delays with the process outlined above will result in a delay of when Release 2 of the Students Portal will be deployed into the Production environment.



### 2.3 Information Collection Clearance (OMB) Schedule

The detailed schedule for the Information Collection Clearance process is shown below.



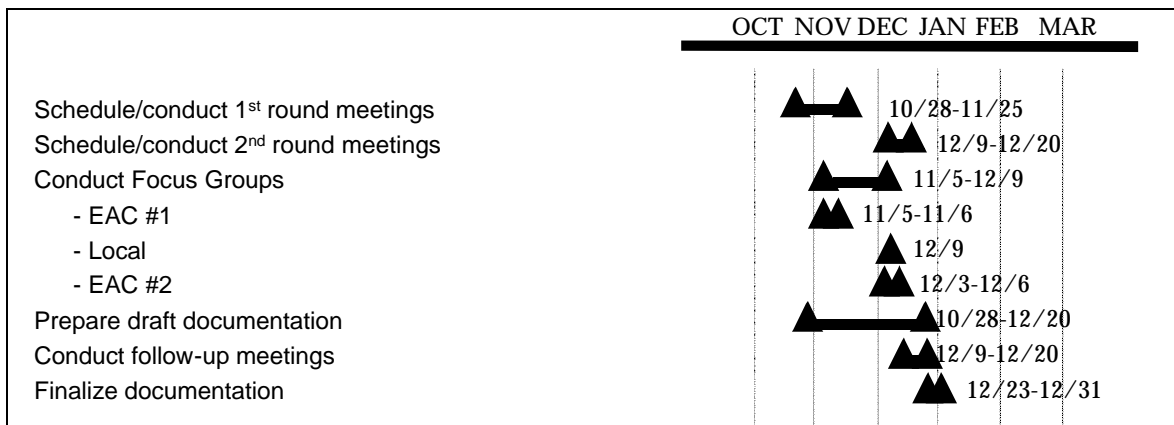
As part of the Information Collection Clearance process, technical workshops are required to capture and calculate the annual hour burden of the Students Portal. We conducted eight (8) workshops with current or potential customers of the Students Portal. We documented the time that it took them to enter information on the Portal even if it is optional. To meet this requirement, the following documentation was prepared:

- R2 ICC Technical Workshop Plan
- ICC Technical Workshop Scripts



## 2.4 Release 3 Requirements Schedule

The Students Portal Release 3 Requirements schedule is shown below.



## 2.5 Stabilization Activities

The following stabilization activities have occurred since the last monthly Stabilization and Transition Support status report.

- Resolved various TeamSite/Templating/OpenDeploy issues. Deployed various attachments and files to production (e.g., 10\_23\_WebPreApp\_0304.pdf).
- Prepared for and conducted several Release 3 requirements discussions.
- Conducted eight (8) Technical Workshops for the Information Collection Clearance process.
- Conducted Focus Group session at the Electronic Access Conference (EAC).
- Began coordinating with the Department for HTML web publication migration from www.ed.gov to Students Portal.
- Continued re-design of VDC database to include Address fields from XAP database.
- Modified ClearQuest PRTL2 Database so that FSA staff can view their own Change Requests.
- Resolved attachment workflow option.
- Resolved TeamSite ID and password for content team member.
- Migrated Release 2 copy of the Portal into the Development environment.

## 2.6 Capacity Planning

As part of on-going capacity planning, WebTrends analysis has been performed with the VDC team. Actual volume for the past month has exceeded projections, but there have been no performance issues. Bi-weekly meetings have been established.

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## **2.7 Open Activities/Issues**

In addition to on-going stabilization, capacity planning, and performance monitoring, the following activities/issues are currently in progress.

- Resolve major TeamSite/deployment production issues.
- Provide follow up on Interwoven Support Case # 1105551 in reference to preview functionality not working correctly.
- Migrate copy of Portal into new VDC staging environment.
- Privacy Act (System of Record) documentation.
- Continue Release 3 requirements collection and analysis to include internal requirements sessions and external Focus Groups.
- Continue re-design (and development changes) of VDC database to include Address fields from XAP database.
- Prepare for testing pre-population from the Portal to the FAFSA on the Web site.
- Continue coordinating with the Department for HTML web publication migration from www.ed.gov to Students Portal. Create new TeamSite workflow and directory structure to support web publications.
- Update Performance Test Plan.
- Update Customer Adoption Plan.
- Create support document with XAP (e.g., SLA, etc.).
- Change PIN logo on homepage.

## **3. Financial Partners Portal Status**

### **3.1 Stabilization Activities**

The following stabilization activities have occurred since the last monthly Stabilization and Transition Support status report.

- Resolved various TeamSite/Templating/OpenDeploy issues.
  - Financial Partners Data Mart Training Manual
  - FMS links
  - Calendar entry
  - What's new entry
  - Homepage Interest Rates text box
  - News alerts (e.g., "FMS Help Desk Now Available")
  - Current Activities page
  - URL cache assistance
- Updated Transition Plan to include the role description of the TeamSite Administrator.



- Provided overview of Autonomy and Interwoven modules/licenses owned by FSA.
- Modify ClearQuest PRTL2 Database so that FSA staff can view their own Change Requests.
- Provided TeamSite File Permission Matrix.
- Provided crontab information from database outage on October 16, 2002.
- Migrated Release 2 copy of the Portal into the Development environment.
- Sent ClearQuest URL to FP Team.

### **3.2 Capacity Planning**

As part of on-going capacity planning, WebTrends analysis has been performed with the VDC team. Projected volumes are higher than actuals, but performance monitoring will continue. Bi-weekly meetings have been established.

### **3.3 Open Activities/Issues**

In addition to on-going stabilization, capacity planning, and performance monitoring, the following activities/issues are currently in progress.

- Update to FP Channel Organization Chart on the Portal site. Provide respective documentation/instructions.
- Migrate copy of Portal into new VDC staging environment.
- Provide Deployment/Workflow History log retrieval process.
- Provide follow up on Interwoven Support Case # 1101307 in reference to saving a Data Content Record (DCR) after modifying content not working properly.

## **4. Summary**

The Students and FP Portals have both received positive feedback from on-line surveys. Survey summaries are available for FSA to monitor this feedback directly. Summary reports are broken down into statistics based on responses as well as a complete listing of all other comments provided. Capacity planning and performance monitoring are on-going for both Portals. CPU utilization on the application and Web servers continue to be low, and there are no capacity issues at this time.

All planned activities are proceeding on schedule. The critical path for Release 2 of the Students Portal is with the ICC process, which is underway. Workshops, Focus Groups, and Release 3 requirements sessions have also begun. Many activities have been completed and issues resolved. The TeamSite deployment and System of Record process for the Students Portal are the only major issues at this time.